Report by the
Summer Innovation Initiative Task Force
October 15, 2013

A Task Force of the
University Innovation Council (UIC)
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<th>Member</th>
<th>Affiliation</th>
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<tbody>
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<td>Associate Vice Chancellor for External Programs, Office of the Provost and Vice Chancellor for Academic Affairs</td>
</tr>
<tr>
<td>Charles J. Hardy (chair)</td>
<td>Professor and Founding Dean, College of Health and Human Services</td>
</tr>
<tr>
<td>Vince Howe</td>
<td>Associate Professor of Marketing, Cameron School of Business</td>
</tr>
<tr>
<td>Cindy Hucks</td>
<td>Assistant Director of Budgets, Budget Office</td>
</tr>
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<td>Scott M. James</td>
<td>Associate Professor of Philosophy and Religion, College of Arts and Sciences</td>
</tr>
<tr>
<td>Elisabeth Stewart Looney</td>
<td>Graduate Student</td>
</tr>
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<td>Maxwell (Russ) McBrayer</td>
<td>Business Officer, Analysis and Reporting, Office of the Provost and Vice Chancellor for Academic Affairs</td>
</tr>
<tr>
<td>Lauren Ariell McKoy</td>
<td>Undergraduate Student</td>
</tr>
<tr>
<td>Richard L. Ogle</td>
<td>Chair and Professor, Department of Psychology, College of Arts and Sciences</td>
</tr>
<tr>
<td>Thomas W. Porter</td>
<td>Chair and Associate Professor of Marketing, Cameron School of Business</td>
</tr>
<tr>
<td>Angelia Reid-Griffin</td>
<td>Associate Professor, Watson College of Education</td>
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<td>Tara M. Romanella</td>
<td>Media Relations Specialist, Office of University Relations</td>
</tr>
<tr>
<td>Nicholas Troutman</td>
<td>Associate Director of Housing Operations, Office of Housing and Residence Life</td>
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Task Force Charge

In pursuit of the goal of enhancing UNCW’s summer activities, I am charging a Summer Innovation Initiative Task Force to study and recommend an action plan for restructuring the institution’s summer programs. The primary focus on this body will be to consider and suggest specific changes to credit-bearing summer activities (“summer school”), including individual and unit incentives for participation, increased online and distance education offerings, and scheduling, funding, and administrative structures. However, the task force is encouraged to recommend changes to non-credit-bearing activities that will enhance our programming, community engagement, revenue-generation and/or overall utilization of the summer period. In order that plan elements may be implemented as soon as summer 2014, the Task Force’s recommendations are requested by October 15, 2013.

Executive Summary

In Spring 2013, the University Innovation Council (UIC) Co-Chairs, Denise Battles, Provost and Vice Chancellor for Academic Affairs, and Charlie Maimone, Vice Chancellor for Business Affairs, charged the Summer Innovation Initiative Task Force to study and recommend an action plan for restructuring UNCW’s summer programs. The primary focus of the Task Force was to consider and suggest specific changes to credit-bearing summary activities (“summer school”). The final recommendations were to include individual and unit incentives for participation, increase online and distance education offerings, and the enhancement of scheduling, funding and administrative structures. The Task Force was also encouraged to recommend changes to non-credit-bearing activities that would enhance UNCW’s programming, community engagement, revenue generation and/or overall utilization of the summer period.

To guide our work, we identified the following principles flowing from UNCW’s three enduring values (Commitment to the Journey of Learning, Love of Place, and The Power of Ideas and Innovation), as well as select UNC System/UNCW Performance Funding Measures (PFM):

1. The primary role of summer programming should be to promote student success. National and UNC System data indicate that summer school participation is positively correlated with student retention and graduation (PFM 1,2,3,10; Commitment to the Journey of Learning).

2. Summer school and programming should help us improve the utilization of our resources (Love of Place).


4. Faculty compensation and unit revenue sharing are critical to expanding summer programs and course offerings (PRM 1,2,3 & 10; The Power of Ideas and Innovation).
5. Multiple delivery platforms are needed to embrace innovation and compete with other institutions (The Power of Ideas and Innovation).

6. Interprofessional and/or transdisciplinary collaborative courses and programs will provide opportunities for greater collective impact (Commitment to the Journey of Learning, Love of Place, and The Power of Ideas and Innovations).

With these principles in mind, the Task Force sought to answer the following questions in order to accomplish our charge:

1. What is the demand for summer school, are we meeting it and how do we increase it?

2. What shared and unique factors drive the decision for faculty and students to participate in summer school and what changes need to be made to increase and sustain motivation for both to participate?

3. What summer school calendar and administrative structure best fits UNCW?

4. What compensation model and revenue sharing model best fits UNCW?

5. What is unique/appealing about programs, pedagogical philosophy, and the value of Love of Place that can increase engagement in summer school and participation in summer programs? How do we promote.market our summer term courses and programs? How does this compare to best practices?

6. How can we involve other populations (out of state students, high school, professionals, seniors, etc.) in educational/training/certificate summer programs?

7. How can we utilize multiple delivery platforms (i.e., face-to-face, online, hybrid and blended, daytime, evening, etc.) to maximize course/program offerings and participation in summer school and summer programs at UNCW?

8. How can summer programs be used to promote interprofessional/interdisciplinary collaborative training, research (scholarship), and teaching?

The Task Force focused efforts on ways of enhancing the role of summer school and summer programs in promoting student success and the generation of revenue that could be shared with participating units that enhance summer offerings. The Task Force began its work on April 12, 2013 and met throughout the spring and summer on a regular basis. The Task Force sought to understand the current summer school model, as well as the UNCW and UNC System policies and regulations related to summer school and programming. The Task Force examined reports generated by the UNC System, two reports generated by Task Forces charged to examine summer school and summer programming at North Carolina State University, and position papers published by the Advisory Board Company – University Education Advisory Board and University Business Executive Roundtable. Moreover, we analyzed operational elements of summer school and summer programming at all UNC System institutions and UNCW Peer Institutions. Following this “educational phase” we divided into five workgroups (Designated Team Leader in Bold Italics):
<table>
<thead>
<tr>
<th>Workgroup</th>
<th>Questions</th>
<th>Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workgroup 1</td>
<td>Questions 1 &amp; 6</td>
<td>Nic Troutman, Beth Looney, Lauren Ariell</td>
</tr>
<tr>
<td>Workgroup 2</td>
<td>Question 2</td>
<td>Rich Ogle, Scott James, Angelia Reid-Griffin</td>
</tr>
<tr>
<td>Workgroup 3</td>
<td>Questions 3 &amp; 5</td>
<td>Vince Howe, Tara Romanella, Johnson Akinleye</td>
</tr>
<tr>
<td>Workgroup 4</td>
<td>Questions 4 &amp; 7</td>
<td>Thomas Porter, Cindy Hucks, Charlie Hardy</td>
</tr>
<tr>
<td>Workgroup 5</td>
<td>Question 8</td>
<td>Scott James, Richard Ogle, Charlie Hardy</td>
</tr>
</tbody>
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Each workgroup sought information to develop specific answers and recommendations to the key questions established and provided updates to the Task Force through scheduled meetings. Activities included interviews with key UNCW offices (i.e., Office of the Provost, Admissions, Financial Aid, Dean of Graduate School and Research, Associate Vice Chancellor and Dean of the Undergraduate Studies, Summer School Office, etc.), development and implementation of a faculty and student survey that explored motivations for participation in summer school and programs as well as ways to increase participation, and additional research on innovative practices around summer school and summer programming. In September, the workgroups began to present their recommendation ideas, which were critiqued by the full Task Force. Once consensus was achieved for each suggestion, the workgroup submitted a written recommendation, complete with the rationale and supporting documentation. Once the “No-Shame Draft” of the Task Force Report was completed, the Chair of the Task Force briefed the UIC on the progress and primary recommendations. The final report was delivered to the Office of the Provost and Vice Chancellor for Academic Affairs and the Vice Chancellor for Business Affairs on October 15, 2013.

Recommendations of the Task Force are presented below. We believe that these are grounded in UNCW’s enduring values and mindful of performance funding measures. These recommendations provide the pathway to strengthen the role of summer school and programming by promoting student success, increase the utilization of the campus during the summer months, and provide incentives and revenue sharing possibilities for individual faculty and units. It is important to realize that while some of the recommendations will require additional discussion and a “phase-in” approach over a number of years, many of the recommendations are intended for implementation immediately so that Summer 2014 will represent the beginning of the transformation.
Recommendations

1. The University should expand summer school offerings in a targeted manner, both face-to-face and distance education, to meet student demand and provide expanded opportunities for new student populations. Areas of focus should include University Studies, pre-requisite courses that are oversubscribed during fall and spring semesters, courses for targeted populations such as incoming students, nonresident students, transfer students and international students, DE courses for current UNCW students who return “home” during the summer, upper level courses for majors, innovative 12 month curriculum models for existing as well as new degree programs.

2. The University should develop a coordinated agenda and organizational structure to increase summer non-credit bearing programs that address strategic initiatives and innovative activities such as faculty leadership development, interprofessional and transdisciplinary research, and service programs, entrepreneurship and innovations, community outreach and engagement activities and programs, and programs for targeted populations such as retirees, tourists and international students. Such programs would balance content with cultural activities that highlight UNCW’s value of “love of place.”

3. To increase faculty interest, involvement and engagement, the University should increase faculty compensation for summer teaching.

4. To align incentives that enhance investment of units in summer school, programming and reward innovative instructional ideas, the University should implement a different budgeting model for summer school that includes revenue sharing for summer school and summer programming. This model should create opportunities for units to realize a portion of the net revenue.

5. To increase effectiveness and efficiencies, the University should change the administrative and operational aspects of summer school and non-credit summer programming. The new model should embrace an overall “blend” philosophy with centralization and decentralization of responsibility and authority. In this model, a limited number of administrative functions should be centralized in the Office of the Associate Vice Chancellor for External Programs, and others would be decentralized to the Academic Colleges and the CSB as well as other units on campus that can assume a leadership/management role for a particular aspect of summer operations. In addition, the calendar and course scheduling models need to be expanded to take advantage of innovative ways of delivering course content and programs to a variety of student populations. Individual units should work in concert with the Office of the Associate Vice Chancellor for External Programs to allow for innovative scheduling to be coordinated across the University.

6. To ensure that we continue to embrace a culture of innovation around summer school and programming, the University leadership should continue to work with the UNC General Administration to adopt innovative and more entrepreneurial policies and procedures regarding summer courses and summer programming.
Current UNCW Summer Model

- Summer term includes Regular Summer School and DE taught in the summer. These two instructional programs are funded differently and interface with the UNCW budgeting process in different ways.
  
  - Funding – Summer is funded primarily from tuition receipts. DE in the Summer is funded from state appropriations and tuition receipts.
  - Budgeting – Summer is a separate budget structure, while DE in the Summer is a part of the UNCW FY budgeting process and structure.

- Summer sessions are as follows – Start Middle of May (e.g., 19th) and End Late July (e.g., 29th). Three terms are offered Summer 1 (S1) – 5 weeks, Summer 2 (S2) – 5 weeks, and Full (F) term – 10 weeks.

- Summer tuition and fees per credit hour are as follows:

<table>
<thead>
<tr>
<th>Student</th>
<th>Summer School Tuition</th>
<th>DE Tuition</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG Resident</td>
<td>$120.49</td>
<td>$126.45</td>
</tr>
<tr>
<td>UG Nonresident</td>
<td>$470.06</td>
<td>$535.33</td>
</tr>
<tr>
<td>G Resident</td>
<td>$138.06</td>
<td>$190.18</td>
</tr>
<tr>
<td>G Nonresident</td>
<td>$538.33</td>
<td>$773.59</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Student</th>
<th>Summer School Fees</th>
<th>DE Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG Ed/Technology</td>
<td>$13.00</td>
<td>$13.43</td>
</tr>
<tr>
<td>G Ed/Technology</td>
<td>$13.00</td>
<td>$19.49</td>
</tr>
<tr>
<td>Mandatory</td>
<td>$33.25</td>
<td></td>
</tr>
<tr>
<td>Student Government</td>
<td>.25</td>
<td></td>
</tr>
</tbody>
</table>

Revenue is calculated for each student type as follows:

Number of Students in a class * Tuition per credit hour * Number of Credit Hours + (Number of Students * Fee Amount)

Total Summer “Revenue” is the sum of all revenues produced by each student type for all classes.

Costs are calculated as follows:

(Instructional Salary + Benefits + Instructional Support)
• Instructional salary by course is calculated at 9.61% * 9 month, academic year salary base for each faculty with upper and lower caps - $5,400 and 3,200.

• The total Summer School budget for the last three years is approximately $3.6 Million – Summer School has exceeded their budget for the last five years with each year concluding with surplus revenues.

• The three year average (2011 – 2013) of Summer SCH is 26,559 with the following distribution by unit:
  - CAS = 17,570 (66%)
  - COE = 1,722 (7%)
  - CHHS = 2,586 (10%)
  - CSB = 4,631 (17%)

• Summer School is administered by the Associate Vice Chancellor for External Programs. As such, the current model is best thought of as a centralized model – one unit organizes and manages the summer school courses. Other than summer camps (primarily Athletics), summer non-credit programs are decentralized with no central organizing unit and/or managing structure.

### Survey of Faculty and Students

In an attempt to understand what shared and unique factors drive the decision for faculty and students to participate in summer school and what changes need to be made to increase and sustain motivation for both to participate in the future, the Task Force administered a survey through SurveyMonkey during August 2013. Three hundred and seven faculty (N = 307) and eight hundred and sixty nine students (N = 869) completed the surveys. The surveys and the summary results are presented in the Appendices. Examination of the surveys by the Task Force revealed four major themes:

1. Adjusting compensation/disbursement models to **increase pay for summer teaching** (increase base pay for summer courses, explore distributing stipend over multiple pay periods to decrease the tax rate, and prorate courses for over and under enrollment) would increase faculty participation in summer teaching.

2. Support student demand through **increasing upper-level (200 level and above) major course offerings.**

3. Adjustments should be considered to the **calendar and course schedule model.** Consider revisions to the summer schedule by offering evening courses, increasing utilization of the 10-week (F term) term for upper level courses, or considering single terms longer than 5 weeks.
4. **Balance online and face-to-face course offerings** to both meet demand for online courses as well as honor the preference of both faculty and students for face-to-face courses. Also, increase marketing efforts of online courses specifically to out-of-state and out-of-area students.

For faculty, the most significant overall drivers of teaching summer school are extra compensation and willingness to help meet student demand for courses. Faculty choose *not* to teach summer school for two primary reasons: summer school interferes with individual research and the compensation is sub-standard. Faculty also reported pedagogical concerns about the compressed time frame of the S1 and S2 for certain courses and a move toward more online instruction at the expense of face-to-face instruction. For students, the most prevalent reasons for taking summer school are graduating early or on time, completing major requirements, lessening workload, and avoiding the struggle of getting into high-demand courses or those that frequently result in scheduling conflicts. The most endorsed reasons for not taking courses, other than the perception of not needing those offered, are those who are seeking employment and internship opportunities, wanting to go home, or not having housing in the area. In addition, students cite the need for increased upper level offerings as a way to encourage future summer school enrollment. Student concerns with the summer experience mainly centered on the compressed time-frame requirements as related to workload and the need to work around employment constraints.
Recommendation #1

The University should expand summer school offerings in a targeted manner, both face-to-face and distance education, to meet student demand and to provide expanded opportunities for new populations of students. Areas of focus should include University Studies, pre-requisite courses that are oversubscribed during fall and spring semesters, courses for targeted populations such as incoming students, nonresident students, transfer students and international students, DE courses for current UNCW students who return “home” during the summer, upper level courses for majors, innovative 12 month curriculum models for existing as well as new degree programs.

A study by the UNC System indicates that attending summer school enhances student progression, retention and graduation rates. Moreover, given that the new performance-funding model includes numerous variables that might be positively impacted by enhancing our summer school and summer programming, a strategic initiative to increase summer school would have additional benefits for the institution.

Specifically, the following is a list of recommendations for expansion of summer school offerings at UNCW:

- Offer multiple sections of high demand courses that historically fill quickly in fall/spring – oversubscribed courses that create gridlock in student scheduling and negatively impact time to degree.

- Offer multiple sections of courses that meet pre-requisite requirements for fall/spring courses.

- Offer more major level (200 level and above) courses.

- Examine course inventory to identify courses that are more appropriate from a student learning perspective for the full term – this should result in more courses being offered in current F term or an extended 12-week term.

- Courses should be offered during off hours when possible to maximize use of time and facilities, inclusive of evening and weekends.

- Where appropriate, curriculum scope and sequences should be redesigned to include required summer school.

- Expand applied, service learning and international study abroad opportunities during summer terms. Internships, practicums within and outside (international study abroad programs) of the Wilmington area should be expanded.
• Offer University Studies courses in predetermined “groupings” - The Interim Associate Vice Chancellor and Dean of Undergraduate Studies provided an initial plan to the Task Force.

• Enhance our online offerings where there is student demand.

When assessed from a university perspective, online distance education classes have financial advantages. Therefore, incentives should be offered to align the interests of the faculty members and academic units with those of the university. The Task Force recommends that all classes offered online should be coded as extension courses (DE with an 800 section number). In addition, the University should make sure that, where appropriate, the DE courses are included in the UNC-Online platform at the UNC System level. Distance Education, as used by the University of North Carolina Wilmington, is understood to include off-campus instruction for credit - whether face-to-face, electronically mediated, or a combination of methodologies.

The survey indicates that as a first choice 65.5% of students would choose to take a class face-to-face. Therefore, it is important that the traditional on-campus summer school program be maintained and populated with appropriate course offerings. However, survey results also highlighted the value of online courses. Roughly half the students that completed the survey (50.3%) indicated that they lived outside the greater Wilmington area during this past summer. When students were asked why they hadn’t taken a summer school class at UNCW, a number of the responses highlighted the barrier to summer school as being located outside the Wilmington area. These responses included “I had a job or internship in another area” – 34%, “I wanted to go home” - 29.2%, and “I didn’t have housing in Wilmington for the summer” - 22.2%. Clearly with half the market located outside the local area, increasing the availability of DE courses is a meaningful approach to increasing the size of the available market. Finally, 41.6% of student respondents indicated that a factor that would influence their decision to take more summer school classes is “More online course offerings.” It is our sense that the best approach is to increase both face-to-face offerings and online DE offerings in a targeted and strategic manner based on the balance between increasing access, sound pedagogy and the values of each academic unit.
### Recommendation #2

The University should **develop a coordinated agenda and organizational structure to increase summer non-credit bearing programs** that address strategic initiatives and innovative activities such as faculty leadership development, interprofessional and transdisciplinary research, service programs, entrepreneurship and innovations, community outreach and engagement activities and programs, programs for targeted populations such as retirees, tourists and international students. Such programs would balance content with cultural activities that highlight UNCW’s value of “love of place.”

- Currently, Athletics leads the campus in summer programming. Summer athletic camps are commonplace at UNCW and provide an opportunity to showcase our University and community, as well as a revenue production mechanism for individual sport teams. All University units (i.e., Colleges and Schools) need to examine this model as a possible mechanism to expand our community outreach and engagement as well as a revenue production system. In addition, collaborating with Athletics to offer multiple modules to typical sport team camps might present partnership opportunities that could be positive for all involved. Engaging more segments of our population (beyond children and high school or college aged students) expands the possibilities available for these types of “summer camps.”

- Create a High School Bridge Program: Market this to parents as a cost saving plan and to students as an “introduction” into college life. It is critical to explore alternative cost structures that include comparison with University System schools, community colleges and regional competitors. Simply put, we must offer such programs at an affordable rate or students will attend programs of this type at other institutions. Package as a Summer Living Learning Community - Cluster Courses: Freshmen Seminar; Basic study requirements - Develop activities & involvement opportunities similar to fall/spring and include life skills and college transition workshops. **Possible Leadership Responsibility - University College**

- Create a Transfer Student Jumpstart Program: Package as a modified Summer Living Learning Community. Develop involvement opportunities similar to fall/spring and include “love of place” activities and transition workshop. **Possible Leadership Responsibility – Associate Provost for Enrollment Management and/or Transition Programs**.

- Develop an International Summer Immersion Program for international students. Admissions could develop a partnership with International Institutions (i.e., Kings College). This program would allow International students to attend UNCW during summer months as part of their existing course of study and/or as a recruitment program for high ability international students interested in attending an American University. The programs could be general and/or focused on a particular field of study such as science, business, education, health, just to name a few. The Associate Provost for Enrollment Management has to explore such options and should be encouraged to develop an
operational plan to pilot such a program. - Possible Leadership Responsibility – Associate Provost for Enrollment Management and/or Assistant Provost for International Programs.

- Develop a faculty leadership summer institute that focuses upon shared governance and the role of faculty senate in universities. The Office of the Provost has taken preliminary steps in developing such an institute, and the Task Force recommends that they move ahead with the establishment of this institute. Possible Leadership Responsibility – Vice Provost and Senior Associate Vice Chancellor for Academic Affairs and/or Director of Swain Center.

- Develop summer conferences for multiple target organizations and populations where content and cultural activities can be blended. All units on campus should be encouraged to think about how we might develop conferences that bring people to our campus and community. Possible Leadership Responsibility – Campus Life – Conference Services.

- Create a mechanism for summer programs or institutes that encourage interdisciplinary research, teaching, or training, and that expand the range of summer participants beyond UNCW populations. Each year, the University Innovation Council could select—through a competitive application process (RFP) — proposals detailing a specific theme, a range of participants, duration, and estimated costs. Special consideration would be given to those that encourage interdisciplinary themes, highlight the importance of “place” and demonstrate potential for revenue production. The funding of several Summer Institutes promises a unique opportunity to promote research and training, as well as establish new sources of revenue for the university. While initial funding might be required to support pilot institutes, the aim would be a self-supporting program. The motivation for such institutes is clear. The most popular reason surveyed UNCW faculty cite for not teaching during the summer months is that it compromises efforts to do research. By funding Summer Research Institutes, the university can fill that gap, increasing faculty presence on campus by opening up opportunities to engage with invited scholars, drawing in non-UNCW populations, and establishing UNCW as a destination for summer scholarship. More than half of surveyed UNCW faculty (146) would be willing to either participate in or organize an interdisciplinary summer institute exploring a common theme. Nearly a quarter of those faculty surveyed volunteered interdisciplinary themes. Possible Leadership Responsibility – UIC, Center for Teaching Excellence and the Associate Provost for Research and Dean of the Graduate School.
Recommendation #3

To increase faculty interest, involvement and engagement, the University should increase faculty compensation for summer teaching.

- **National Models**
  - % of Academic Year Salary
  - A Per Credit Hour Flat Rate
  - A Per Student Flat Rate

Variations of these models exist and allow adjustments for faculty rank and student enrollment, as well as salary caps and minima.

- **Current UNCW Model**
  - Instructional salary is calculated at 0.0961 (9.61%) * 9 month salary base for each faculty with upper and lower caps - $5,400 and $3,200. Course credit hour adjustments are made on the basis of the following: 6 credit hour lecture course = 19.22% of AY salary, 4-5 credit hour lecture-lab course = 0.8334 * 0.1922 * 9 month salary base, 1-2 credit hours with 3 or more contact hours = 0.85 * 0.0961 * 9 month salary base, 1 credit hour, 2 contact hours laboratory = 0.333 * 0.85 * 0.1922 * 9 month salary base, PED Activity Courses = 0.50 * 0.0961 * 9 month salary base.

  - Minimum enrollment of 20 for undergraduate courses and 14 for graduate courses are required to “break even.” Undergraduate courses with less than 15 will be prorated with course cancellation at an enrollment of 7. Graduate courses with less than 7 are prorated with course cancellation at an enrollment of 4.

- **Task Force Recommendations Related to Faculty Compensation**
  - Salary for teaching summer courses is recommended to be a percentage of 9 month, academic year salary per credit hour. It is recommended that the percentage be 1/9th (.1111 or 11.11%) of the 9 month salary for a 3 credit hour course. Faculty (9 month employees) are limited to 1/3 (.333 or 33.3%) of their nine-month salary for any combination of Summer School or other Summer Pay under the Supplemental Payments for UNCW Employees Policy – Out of Contract Period. It is recommended that the University reexamine the Supplemental Pay Policy as applied to compensation for summer teaching, with particular emphasis on the limitations for out of contract maximum limits 33.3%. This should be done to ensure that supplemental compensation policies are prioritized to maximally incentivize summer teaching.

  - Salary for courses that do not carry 3 credits should be calculated using a per credit hour rate of 0.0370 or 3.70% (1/9th divided by 3). Faculty salary for supervision internships, practicums, clinics, applied learning experiences and directed individual study/research should be determined at the unit-
Department/School - level based upon workload equivalencies. All units should be required to have workload equivalency policies on file in the Office of the Dean.

- Maximum unadjusted salary cap is recommended to be $6,000 for a 3 credit hour course, and minimum unadjusted salary cap is recommended to be $4,000 for a 3 credit hour course that meets the minimum enrollment.

- Minimum course enrollment for full salary is recommended to be as follows: Undergraduate and Graduate Face to Face = 15 and Distance Education Classes = 10.

- Salary Adjustments are recommended for under and over enrolled courses. Salary for courses that are under enrolled should be reduced by using the current proration model (prorated reduction percentage = # students in the class/15 or 10. Salary for 3 credit hour courses that are oversubscribed will be increased by $100 per student above the course minimum.

- Temporary faculty should receive equivalent pay for summer as provided in the AY; however, the proposed upward and downward adjustments should be applied to the summer salary.

- It should be the responsibility of the Chairs, School Directors and Deans, to determine what courses to offer, enrollment caps and class size, whether a course with low enrollment should be offered or canceled, and to manage their summer school budget to ensure that they remain fiscally viable.
To incentivize Colleges/Schools/Departments to enhance summer school offerings, the following revenue sharing model is recommended for both Summer School and DE offered in the summer:

**Summer Net Revenue = Summer Gross Revenue – (Instructional Salaries + Benefits + UNCW Overhead) – Base Budget**

**DE Net Revenue = DE Gross Revenue – Instructional Salaries + Benefits + UNCW Overhead – Base Budget**

- **Summer Gross Revenue = Student Credit Hours (SCH for the course) * Tuition per Credit Hour**

- **DE Gross Revenue = Allocations + Student Credit Hours (SCH for the course) * Tuition per Credit Hour**

- **Instructional Salary + Benefits = 11% of AY Salary for 3 credit hour course (Salary) * 22.33% (Benefits)**

- **UNCW Overhead = percentage of revenue needed to cover existing UNCW commitments charged to the summer school budget – currently this = 20.50%. For DE, the overhead = 15.2%**.

- **Base Budget = Projected Instructional Costs (College/School and Other Units Involved in Instruction and Programming) for the summer terms. This base budget will be determined by historical performance of last three years (i.e., SCH production, costs, revenue, allocations, etc.) and made directly to Department Chairs, School Directors and Deans.**

- **Net Revenue will be dispersed to “reward” and incentivize departments, schools, colleges, and other units involved in summer programming. We recommend the following Net Revenue be split three ways – Unit Producing the Revenue (Department and/or School), College or Cameron School of Business, and UNCW (Office of the Provost). Our recommendation is a 40%, 40% and 20% split; however, we must make sure all overhead is covered through Net Revenues calculations until we are able to identify direct costs and address the cost shifting practices that are currently in place. While it is true that large enrollment courses maximize revenue, quality of instruction must remain our number one priority. Further, it will be critical to examine the “cost-
shifting” commitments that are currently in place and seek to reduce the overhead costs for summer terms to increase net revenues.

- For the revenue sharing model to be successful, Unit Managers (Department Chairs, School Directors and Deans) will need to monitor costs and revenues and seek an appropriate balance. We should examine our costs and identify ways of cutting overhead expenses and attempt to allocate non-program related costs to the FY budget versus cost shifting them to summer. On the revenue side, we must monitor tuition costs across the system and within our state and region so that we remain competitive and provide the necessary revenue to provide the funds for the recommended salary increase and the realization of net revenue. In this vein, we also recommend that we increase summer (per credit hour) tuition as follows:

<table>
<thead>
<tr>
<th>Student</th>
<th>Current Tuition</th>
<th>Proposed Tuition</th>
<th>$ Delta</th>
<th>% Delta</th>
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*Recommendation adapted from WVU Entrepreneurial Models*

- For the DE revenue sharing model to be successful, the University will have to change the model of distribution of state appropriations so that funds can be tracked at the program level.
**Recommendation #5**

To increase effectiveness and efficiencies, the University should change the administrative and operational aspects of summer school and non-credit summer programming. The new model should embrace an overall philosophy of a “blend” of centralization and decentralization of responsibility and authority. In this model, a limited number of administrative functions should be centralized in the Office of the Associate Vice Chancellor for External Programs, and others would be decentralized to the Academic Colleges and the CSB, as well as other units on campus that can assume a leadership/management role for a particular aspect of the summer operations. In addition, the calendar and course scheduling models need to be expanded to take advantage of innovative ways of delivering course content and programs to a variety of student populations. Individual units should work in concert with the Office of the Associate Vice Chancellor for External Programs to allow for innovative scheduling to be coordinated across the University.

In this model some management functions would be centralized in the Office of the Associate Vice Chancellor for External Programs, Associate Vice Chancellor and Dean of Undergraduate Studies and Associate Provost for Research and Dean of the Graduate School and the Swain Center, and others would be decentralized to the Academic Colleges and the CSB as well as other units on campus such as Office of International Programs, Office of Admissions, Office of Transition Programs, etc. In addition, the calendar and course scheduling models need to be expanded to take advantage of innovative ways of delivering course content and programs to a variety of student populations.

**Organizational Structure**

- Overall suggestion is to evolve towards a hybrid centralized-decentralized model for both summer school and summer programming.

  - **Functions benefiting from centralization:**

    - Major factor favoring centralization is need for “**General Contractor**” functionality; i.e., someone or some standing committee needs to be able to respond to summer school proposals, questions, report requests, etc. This entity needs to provide the necessary university wide coordination and integration of summer school issues relative to the Registrar’s Office, classroom scheduling, Distance Education, Housing, Financial Aid, Swain Center, and other activities listed below:

      - Billing – tuition and fees, program costs, etc.
      - Marketing and Communication (University Relations – Addition of new technologies as well as branding and telling our story)
      - Reporting (UNCW, GA, etc.)
      - Maintaining records/data useful for future allocation decisions
• Coordinate with Campus Activities to arrange events, activities, etc., for summer school students (several student complaints re: lack of activities)

  o **Functions benefiting from decentralization:**

    ▪ Scheduling courses and faculty assignment
    ▪ Faculty payroll processing – supplemental pay forms, HR Online actions
    ▪ Proration of salaries, subsidizing courses; e.g., capstone courses, etc., to develop relevant portfolio of summer courses by unit
    ▪ Determination of faculty loads and course cancellation

• For professional development and continuing education programming, it is recommended that the Swain Center be involved in the administration and operational management.

**Marketing**

In terms of marketing, we recommend a significant increase in marketing activities around targeted student populations. We suggest a centralized approach developed by the Office of University Relations, which will create a consistent story with appropriate UNCW branding and use of technology to facilitate admission, registration, etc. A marketing budget should be developed and considered as a cost in determination of overall budgeting. We would also recommend that the current work of the UIC on use of technology to enhance marketing and student/University interface be continued and expanded. The following ideas and examples are offered to enhance our marketing model:

  • **Overall UNCW Quality Points for “Love of Place” integration into marketing for summer school and summer programming:**

    o The coastal environment, historic downtown area - riverfront – vacation destination
    o Best University rankings/rewards from US News and World Report, Kiplinger’s, Peterson’s, etc.
    o Enduring values of “Commitment to the Journey of Learning, Love of Place and the Power of Innovation and Ideas.”
    o Faculty engagement
    o Campus wide focus on INNOVATION
    o Young, vibrant, entrepreneurial environment
    o Small college culture, big university options
    o Numerous summer job opportunities
    o Recreation, events, concerts and other Cape Fear area amenities
• **Existing Students**
  o Key attributes:
    ▪ accelerate or catch up to degree program requirements
    ▪ beach/coastal environment
    ▪ on-line classes
    ▪ university study cluster courses – specific focus on bundling courses together for students (cohort model)
    ▪ vacation oriented jobs
  o Marketing methods/media/calendar
    ▪ Emails
    ▪ Signage around university
    ▪ Materials for advising sessions
    ▪ Concentration during pre-spring advising sessions
    ▪ Technological advances and tools

• **High School Students**
  o Key Attributes
    ▪ Bridge/ramp up classes
    ▪ Beach/Coastal environment
    ▪ Orientation, registration and jump start your college career
    ▪ Vacation oriented jobs
  o Marketing methods/media/calendar
    ▪ Acceptance letters, communication
    ▪ Summer school posters (coastal environment – enduring values) sent to high schools
    ▪ Separate Summer School user-friendly webpage
    ▪ Bundling of services; e.g., courses, orientation, advising, housing, events, transportation, cohort model for networking…all at one price
    ▪ Technological advances and tools

• **Transfer Students**
  o Key Attributes
    ▪ Transition
    ▪ Orientation, registration and courses
  o Marketing methods/media/calendar
    ▪ Acceptance letters
    ▪ Summer school posters sent to community colleges
    ▪ Separate Summer School user friendly webpage
    ▪ Same bundling of services listed above for high school bridge program
    ▪ Technological advances and tools
**Calendar Tweaks and Flexibility**

Some faculty and students expressed the concern that the compressed time frame of Summer 1 (S1) and Summer 2 (S2) terms made it difficult to convey the same quantity and quality of material in a traditional semester-long class:

- **Solution:** Emphasize F-term (10 week) or add a new 8-week term that would be a better fit in terms of need for longer time. F-term is traditionally used for internships and other service-learning courses, but may be beneficial for other classes that may require more reflective/integrative time. F-term or a new 8-week term may also be useful for:
  - Groupings of University Studies classes to meet student needs during the summer (see related logic in section on marketing to existing students, high school bridge students, and transfer students).
  - Graduate, capstone and lab classes that may need more reflective and integrative time.
  - On-line classes where an expanded time frame would allow more flexibility for working professionals.

- **Consideration** should be given to beginning the S1 session later, so that it would end after July 1st. This would solve the cash flow/expenditure problem associated with ending S1 a week or less before the end of the AY and rushed judgments to spend money and/or eliminate the need for “cost shifting.”

- **Potential barriers** that would need to be addressed if we adjust S1 and S2 terms and keep at 5 weeks each include:
  - S2 courses would be pushed into August, which may cause problems with completing needed repairs, renovation, etc., between terms, especially for housing.
  - Potential system issues/delays with closing student records to clear for summer graduation.
  - One suggestion mitigating these concerns would be a 1 or 2 week overlap between S1 and S2. This would not be a real issue with housing or different lengths for S1 and S2 – currently they are both 5 weeks. We could consider making one 5-6 weeks and the other 4-5 weeks long to address timing issues presented above. Overlapping terms may be problematic for some students, so flexibility should be employed.

- **Provide academic colleges/CSB the flexibility to set up non-traditional term lengths,** e.g., 1, 2, or more weeks to meet the needs of their student populations, certification programs, immersion programs, workshops, etc., as needs arise.
  - Cohort based programs could offer intensive 1-2 week sessions to provide students with needed skill sets and/or program prerequisites.
  - Also, several of our master’s programs could offer prerequisite courses during the summer that must be completed prior to program admission.
Distance Education – Online Courses

Anecdotal evidence indicates that across campus, online courses are being taught both as DE (extension courses with an 800 coded section number) and as traditional departmental offerings (those with 000 section numbers). While during the Fall and Spring semesters, listing online courses with 000 section codes ensures that units get appropriate student-credit hours relative to main campus students, there is no compelling reason to offer an online course as a traditional departmental offering during the summer. Given the advantages of DE as described below, we suggest all online classes offered in the summer should be coded as DE.

In addition to increasing access to those who are out of the Wilmington area during the summer, DE has significant financial advantages. One major advantage of DE concerns how the revenues must be spent. Summer school is a self-contained unit where all summer school revenues must be spent on summer related expenses during the corresponding academic year. This can lead to non-strategic spending at the end of the Summer I term. DE, on the other hand, can be utilized on more than just summer related expenses. The second key advantage of DE is that it generates state appropriations, whereas Summer School does not. This means that when students sign up for a DE course, UNCW receives both the tuition revenue and the state appropriation revenue.

These advantages are supported by findings from the student survey discussed under recommendation #1 on page 15. The three that are most notable are: 1) DE/Online courses would assist UNCW to create and expand access for non-traditional students that are place-bound and for those who are not willing to travel to the main campus to take face-to-face courses during summer, 2) Allow UNCW to tap into the sizable segment (41.6%) of its own student population who either return home for the summer for economic reasons or engage in full time work in the local community but still would like to take a course or two from UNCW, and 3) It creates an opportunity for UNCW to intensify its effort in providing online/e-learning training development exercises for faculty who express the desire to be trained in this ever growing environment.

Research has, in fact, shown that the more faculty are trained in the use of online/e-learning technologies, the less apprehensive they become generally in embracing the online/e-learning technology and the willingness to engage or participate.

These advantages, when combined with the opportunity of better serving UNCW students located outside the local region, make increasing the breadth of online offerings a priority. However, offering more online courses must be done with respect for the fact that a significant majority of faculty and student prefer face-to-face courses, and must consider the relative lack of experience and familiarity with e-learning among the faculty. The survey showed that faculty strongly prefers teaching face-to-face (preferred by 66.9%) of respondents as compared to 20.6% who prefer online. The committee is also aware that some courses, pedagogically, are not easily packaged or well suited for online delivery. Consequently, we believe that department chairs and faculty should be encouraged to find the balance between serving the students who desire face-to-face and those seeking more online offerings. One key incentive for encouraging more DE courses might be offering course development grants to faculty willing to teach a new prep online. The financial incentive of the grant might be paired with a required course development workshop for developing an online course (thus overcoming the lack of familiarity problem). This process is already in place - $5,000.00 is paid to faculty to attend training workshops and develop an online course at the end of the workshops. We recommend that this process continue.
A second key incentive to teaching online might be to lower the level at which the upward proration (“bonus”) for increased number of students kicks in. For example, if the bonus for having additional students in a face-to-face summer school class is set at 15 to correspond with the break-even point for face-to-face summer classes, the corresponding level at which the bonus might be set could be 10 for an online class.

All of this said, the committee acknowledges that decisions about how to increase DE offerings (if at all) are best left to individual units. Those most familiar with their content area and student demand are in the best position, we assume, to strike the optimal balance between increased DE offerings and traditional face-to-face courses. Touting the advantages of DE should not be seen as encouraging units to compromise levels of instruction. The committee does not suppose that all courses are amenable to online delivery.
Recommendation #6

In order to insure that we continue to embrace a culture of innovation around summer school and programming, the University leadership should continue to work with the UNC General Administration to adopt innovative and more entrepreneurial policies and procedures regarding summer courses and summer programming.

- Continue to explore the role of the conversion from state funding to a tuition revenue model on summer enrollments and student progression, retention and graduation. State appropriations for summer school were discontinued in 2005 by the NC General Assembly.

- Continue to explore how to afford students financial aid for summer courses and/or programming.

- Continue to examine the role of summer school in the scope and sequence of degree programs with consideration of making summer a required “third” term for degree completion.

- Continue to examine reconceptualization of “in contract” terms for faculty to allow fall/summer, spring/summer, in addition to fall/spring. Such a model would allow faculty to spread their workload over the 12 months of the calendar year. While moving faculty from a 9 month to a 12 month calendar is potentially advantageous to spreading the workload across the calendar year, the financial aspects of such a model might be cost prohibitive.

- Continue to examine how summer net revenue funds will be eligible to carry over from one fiscal year to the next.

- Continue to examine the need to modify University policies, processes and norms so that we can fully embrace the 12 month calendar to offer students and our communities year round courses and programs to enhance their education and life quality.
Concluding Remarks

The Task Force recommendations are based upon many hours of research, discovery, discussion and reflection on the part of its members. At the risk of being redundant, our efforts were guided by principles flowing from UNCW’s three enduring values - Commitment to the Journey of Learning, Love of Place and The Power of Ideas and Innovation - as well as select UNC System and UNCW Performance Funding Measures.

We believe that our recommendations are consistent with these values and the PFM’s. We believe that our recommendations will enhance the UNCW student experience and contribute to the UIC initiative to reconceive the university calendar to better utilize the 12 months of the calendar year, while also taking advantage of our coastal location. We also feel that our recommendations will provide the necessary incentives, resources and operational structures and procedures to increase participation of students and faculty in summer school and summer programming.

Implementation of the recommendations should begin immediately. While additional technical assistance and process development will obviously be necessary as we seek to operationalize the recommendations, the Task Force recommends that the transformation of summer school and summer programming be initiated for Summer 2014. Consideration should be given to the establishment of a Summer Innovation Implementation Task Force to do the work to ensure that change is implemented based on data and with an eye toward operational integrity.

Summer school and programming in the UNC system is a very complicated process. While we have a successful summer school at UNCW, we believe that our recommendations will not solve every problem that can be identified. We do believe that we have attempted to address the most pressing issues for students, faculty, the community and the institution. In short, we believe our recommendations will help transform the summer experience at UNCW. We believe that our recommendations represent a start of this exciting journey. Let’s Dare to Soar!

Note
The Task Force used numerous resources to inform the recommendations included herein. In addition, the Task Force generated numerous reports and financial models to inform our recommendations. These materials are presented as an Appendix to the report.